

# **Welcome to Blue 8:**

## **What's New and What's Changing**

# Blue 8 Webinars – 3 Presentations

- **Webinar 1:** Introduction to Blue 8: overview of user experience changes and new features to come, review of deprecated functions
- **Webinar 2:** In-depth review of changes to end user experience for Rater Selection and questionnaire Fill Out, and related interface changes for Blue Admins
- **Webinar 3:** Focus on Question Personalization and Subject Management interface changes

# Agenda

- **Overview of upcoming changes in Blue 8**
  - User experience changes for end users and Blue Administrators
  - New functionality
- **Deprecation / retirement of little-used functions**
- **Q&A**

# Better user experience for end users

**New look and streamlined flow for:**

- Questionnaires
- Rater selection (360 projects)
- Question Personalization (QP)
- Subject Management (SVM)

# New look for questionnaires

- **Mobile-first design with consistent look & feel for desktop**
- **Larger font and question layout**
- **Better visual cues for response selection(s)**
- **WCAG 2.1 accessibility compliant**
- **GDPR data security compliance (cookies on all web forms and other data protection measures)**



## Chemistry

### Details

A part of our focus on improving the student experience at Your University we are seeking your feedback on the courses in which you are currently enrolled. We believe this feedback will help us better understand and address the issues facing students such as yourself.

Select the response which best reflects your experiences of the course. If you have no experience of a particular question please select 'Not Applicable' for that question. Please use the space provided at the end of the questionnaire if you wish to comment further about any aspect of this course. Because your feedback is important we may send reminders after a few days if we haven't received your reply.

If you are unable to complete the survey in one session, make sure to save your review by clicking the "SAVE" button. To resume a previously saved survey, return to your original email containing the link to your course feedback. If your session times out prior to submitting, please return to your original email


[Start Now](#)

# New Thank You message options

- Include task list
- Optional completion certificate

**Your responses have been submitted successfully!**

Thank you for providing your feedback. As you know, we put feedback at the core of everything we do. We greatly appreciate you taking the time to complete this learning evaluation to better the experience for all future learners. Click continue to return to the task list and complete any remaining learning evaluations.

 Download the certificate

02 | WS1005-T-I: Human Rights & Social Issues-T-I

In progress
Ends on: 31 Jan 2020

Continue

03 | PY2106-C-I: Human Development across the Lifespan-C-I

In progress
Ends on: 31 Jan 2020

Continue

04 | PY1102-T-I: Exploring Psychology II-T-I

Open
Ends on: 31 Jan 2020

Start Now

View all

# Updated Question Personalization views

- Easier navigation with Table of Contents
- Onscreen cues for question selection thresholds
- Thresholds can be set globally for total selections allowed, or optionally set per level when using question themes or categories
- Question selections can be copied from project to project



# Rater Selection changes for 360 Projects

- More intuitive to use
- Clearer visual cues about how many to invite per group
- Keeps count of number of invitations per person, to prevent overload of requests
- Locks access to names when maximum invitations have been reached – limits are set by Blue Admin

# New Subject Management views

**Provides central access to all allowed / assigned functions:**

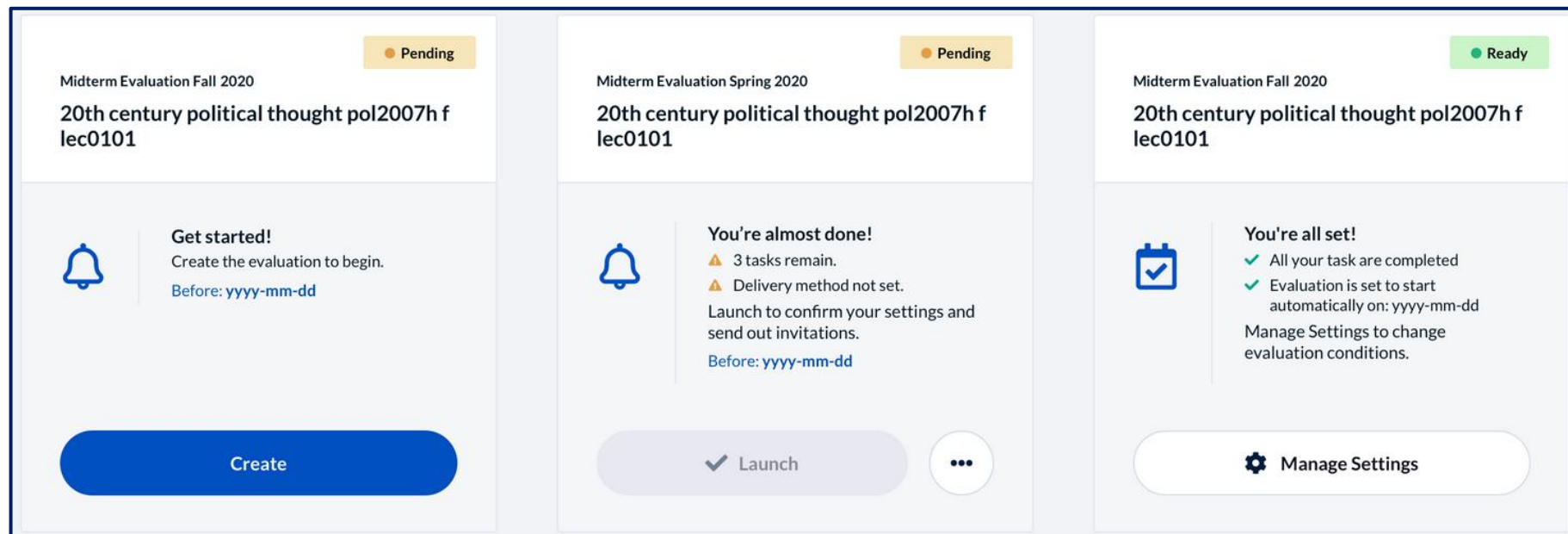
- Question Personalization forms
- Evaluation date controls
- Reports

**New optional functions:**

- Ability to create mid-term evaluations
- Provide QR code access to questionnaires

# Optional Tile View

- Provides central view for all courses/subjects
- Shows status per course/subject
- Guides users through next available steps

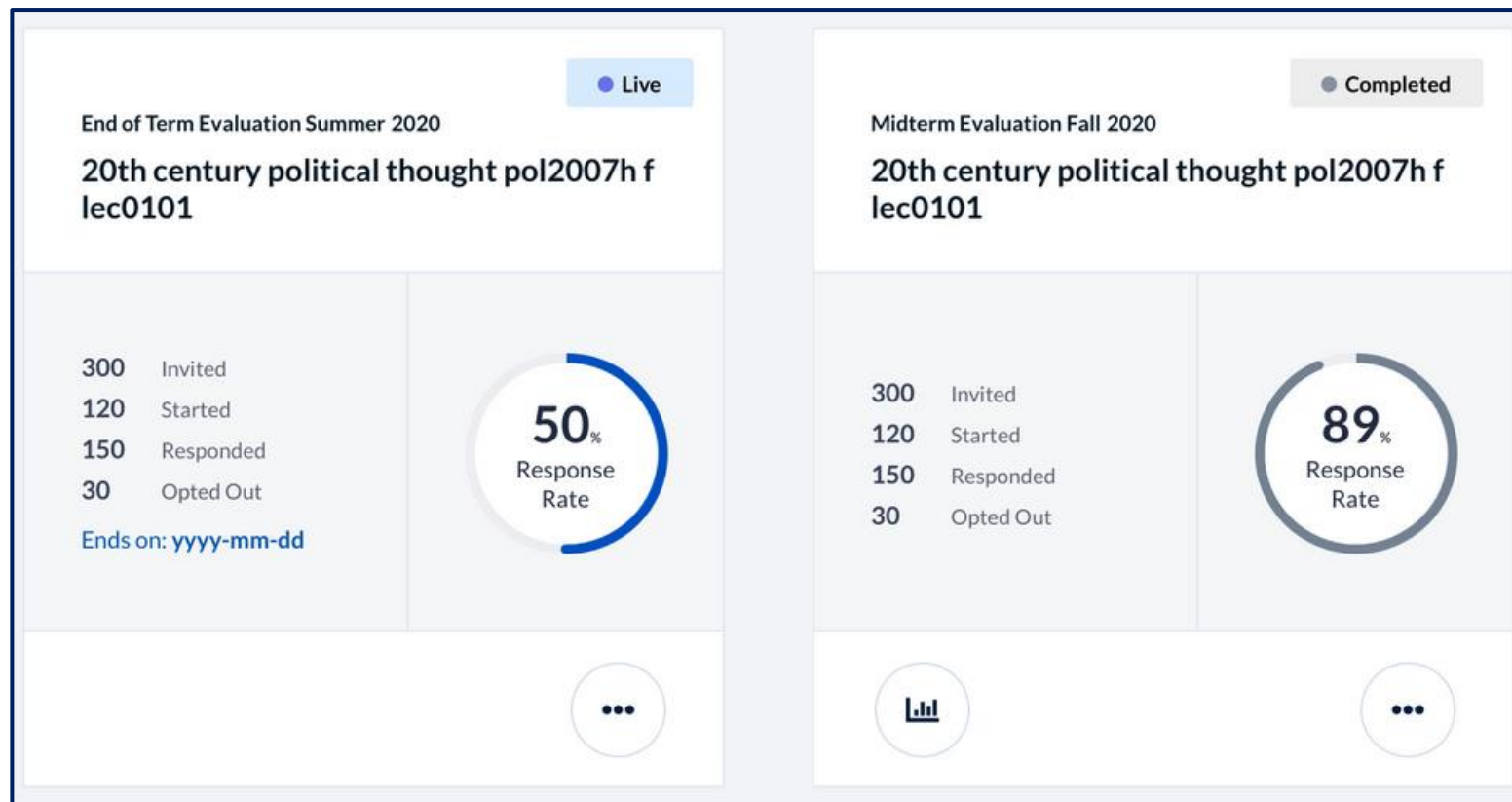


The screenshot displays three evaluation tiles for the course '20th century political thought pol2007h f lec0101'. Each tile has a status indicator in the top right corner: 'Pending' (orange dot) for the first two and 'Ready' (green dot) for the third.

- Tile 1 (Pending):** Titled 'Midterm Evaluation Fall 2020'. It features a bell icon and the text 'Get started! Create the evaluation to begin. Before: yyyy-mm-dd'. A large blue 'Create' button is at the bottom.
- Tile 2 (Pending):** Titled 'Midterm Evaluation Spring 2020'. It features a bell icon and the text 'You're almost done! 3 tasks remain. Delivery method not set. Launch to confirm your settings and send out invitations. Before: yyyy-mm-dd'. A light blue 'Launch' button with a checkmark and a three-dot menu icon are at the bottom.
- Tile 3 (Ready):** Titled 'Midterm Evaluation Fall 2020'. It features a calendar icon with a checkmark and the text 'You're all set! All your task are completed. Evaluation is set to start automatically on: yyyy-mm-dd. Manage Settings to change evaluation conditions.' A white 'Manage Settings' button with a gear icon is at the bottom.

# Optional Tile View

- Clearer tracking of response rate details




# New Functionality

- Mid-term evaluation setup / controls
- QR code access to help boost response rates
- Central access to reports
- Additional options

Midterm Evaluation. Fall 2020
Cancel

Start Date
00:00 PM

End Date
00:00 PM


Share evaluation  
View QR code or copy short link to share the evaluation.

View QR Code

<https://www.explorance.com/ShareLink>

☐ I have finished all my tasks, please stop sending me reminders

Update

Reports for:  
Adv top-analytcl chm chm1103h-f-lec0101
Close

Search...

End of Term Evaluation Summer 2020  
Adv database management sys
Spring 2019

End of Term Evaluation Summer 2020  
Adv database management sys
Spring 2019

End of Term Evaluation Summer 2020  
Adv database management sys
Spring 2019

End of Term Evaluation Summer 2020  
Adv database management sys
Spring 2019

# Interface changes for Blue Admins

- Reorganization & consolidation of settings in Admin console, notably in Tasks screen
- Reorganized configuration of evaluation/survey schedules and notifications
- Task changes designed to help centralize projects when working with multiple schedules and different notification requirements
- Visual cues and better labelling of functions to help guide administrators with setup

# Task Screen Reorganization

Info

Questionnaire

Definition

Subjects

Members

Triggers

Access

Tasks

Language

Publish

Task configuration

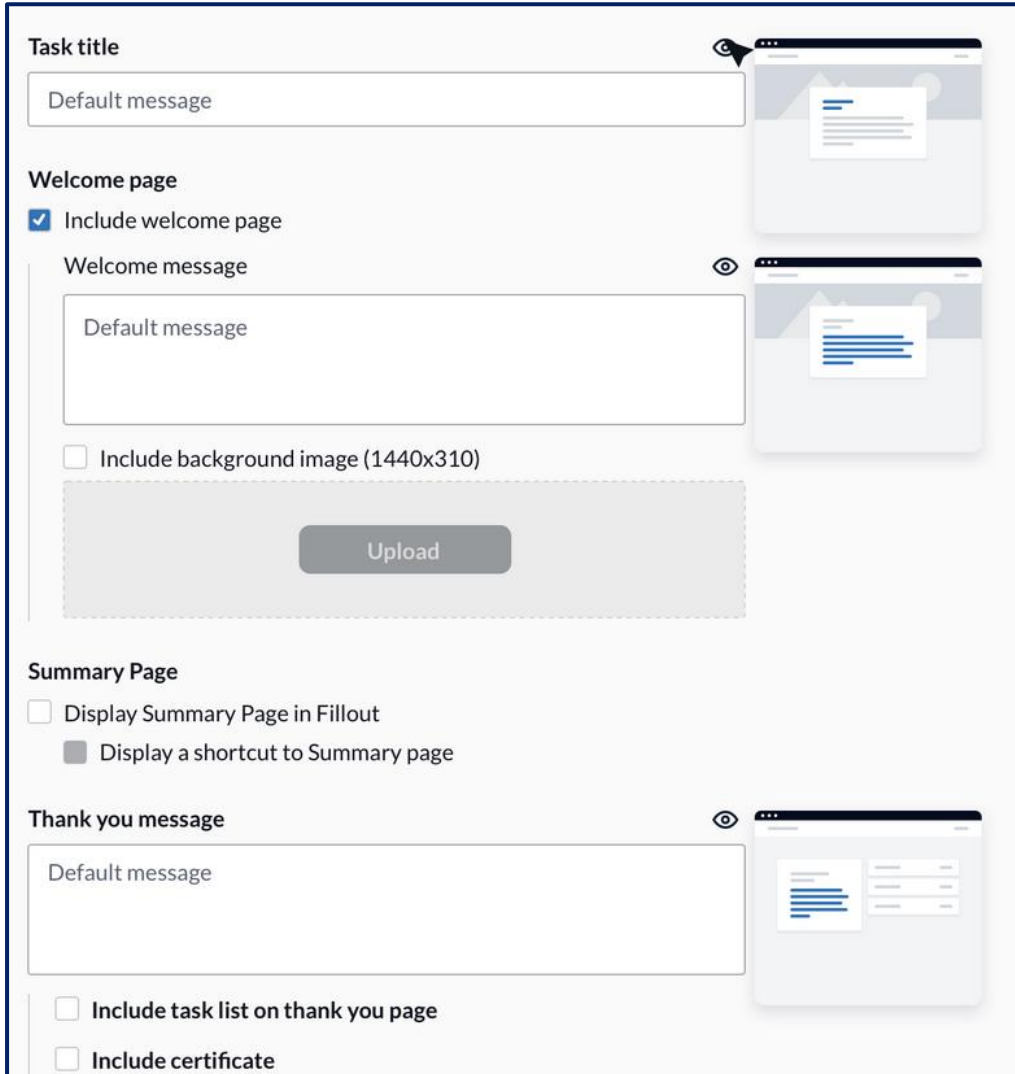
Centralized emails

Select and configure project task

Enable	Task type	Schedule dates	Actions		
<div><div></div>No</div>	Subject management		Configure	Schedule	Preview
<div><div></div>No</div>	Rater selection		Configure	Schedule	Preview
<div><div></div>No</div>	Rater selection signing		Configure	Schedule	Preview
<div><div></div>No</div>	Question personalization		Configure	Schedule	Preview
<div><div>Yes</div><div></div></div>	Question personalization signing	2 schedules configured	Configure	Schedule	Preview
<div><div>Yes</div><div></div></div>	Fillout	Start: 06/14/2020   End: 10/23/2020	Configure	Schedule	Preview

# Fill Out Task Changes

- **Welcome & Thank You message sections moved to FO Task screens**
- **Allow for custom look & feel**
- **Option to display task list in Thank You message screen: easier access to remaining surveys**
- **Option to include completion certificate**



**Task title**

Default message

**Welcome page**

☒ Include welcome page

Welcome message

Default message

☐ Include background image (1440x310)

Upload

**Summary Page**

☐ Display Summary Page in Fillout

☐ Display a shortcut to Summary page

**Thank you message**

Default message

☐ Include task list on thank you page

☐ Include certificate



# Support for multiple schedules

- Supports different evaluation periods and message content per schedule
- Can copy and reuse schedule settings
- Applies first schedule that meets all conditions, so non-standard schedules should be placed at beginning of list

General
Schedule
Centralized Emails



Schedule Configuration

### Schedule List

Tasks will use the first schedule that meets all of the conditions.

Move to position
Go

Results: 2 of 2 Items

<input type="checkbox"/>	Index	Title	Notifications	Condition	Configure schedule
<input type="checkbox"/>	1	Engineering Department		<a href="#">Condition</a>	<a href="#">Configure schedule</a>
<input type="checkbox"/>	2	Standard Schedule		<a href="#">Condition</a>	<a href="#">Configure schedule</a>

# Conditional Schedules – all task types

Create unique schedules based on conditional rules:

- Primary or Secondary Subject data
- Date range filter for Dynamic Days configuration

General
Schedule
Centralized Emails

Condition Settings

Select condition type  
Subject Field

Selection List

Dept
Contains
Engineering

Name
Contains

Name
Contains

Filter Clear

[Dept] contains 'Engineering'

Results: 1 - 10 of 10 Item(s)

	Name	Dept
<input checked="" type="checkbox"/>	401917 Geomatics Measurement Techniques	Civil Engineering
<input checked="" type="checkbox"/>	401918 Geomatics Measurement Techniques	Civil Engineering
<input checked="" type="checkbox"/>	401921 Municipal Planning and Engineering	Civil Engineering
<input checked="" type="checkbox"/>	401923 Municipal Planning and Engineering	Civil Engineering

# Message controls per schedule

- Supports different messaging needs per subject group (schedule)
- Set up to 5 reminders per schedule item
- Optional Completion notification

Schedule Configuration

Schedule name

Fill Out

☒ Turn off all email notifications
   
☒ Turn off all SMS notifications

Start Date

Invitation Notifications

Based on

Set date and time

Fixed time

2020/10/29 11:03

Define end date

Completion Notifications

Based on

Set date and time

Fixed time

2020/11/14 11:03

Set reminders

Add Reminder (0/5)

# New Features / Task Settings

# Fillout Completion Certificates

Include custom completion or attendance certificates when needed

### Certificate


Personalize the certificate settings.

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**General**


Color:

Logo 1:

 Upload a logo

Recommendation 300x100px

Logo 2: [Remove](#)

 Upload a logo

Recommendation 300x100px

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**Text**

Title:

En

Description:

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Langage available English

N° 0000000000



**Lorem ipsum dolor sit amet, consectetur  
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to

**First name last name...**

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Place  
your logo  
here



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Date: 10 / March / 2020

# Self-enrollment and QR code access

**Additional functions can be used to help boost response rates:**

- **QR code access to survey / evaluation forms**
  - **Code generation available in new Subject Management views**
  - **Provides easier access to forms with mobile devices**
- **Self-enrollment option added to the Fillout task > Advanced settings**
  - **May be used for corporate event surveys, conferences, other surveys needing voluntary involvement**
  - **Users can self-enroll from the task list & choose items from dropdown list**
  - **Used with private surveys that require authentication**

# Deprecated / retired functions

# Features no longer supported in Blue 8

- **Subject Fill Out / External triggers: SFO permissions, tasks and external trigger links removed from Admin console**
- **Test feature: results of Test projects should be backed up prior to Blue 8 upgrade**
- **Definitions: Multiple Primary and Multiple Secondary User Roles removed**
- **Themes: removed CSS custom theme support for questionnaires; built-in theme options will apply to reports only**



# What's next / Resources

- [Blue 8 Product Notice](#)
- **Webinars 2 & 3 early in New Year to review changes in depth**

Questions?

# Thank You!